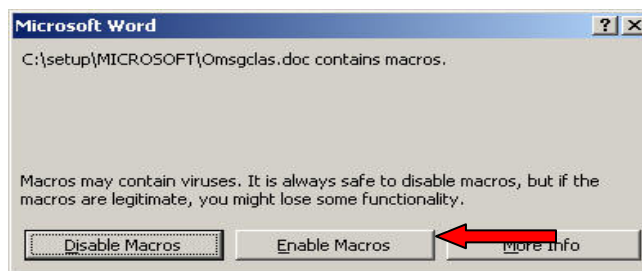




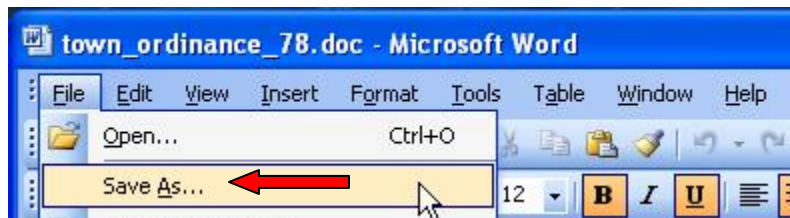
## Person-Centered Planning (TIP SHEET)

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- ❖ Upon opening the document, if a box appears that directs you to disable or enable macros, **ENABLE** the macros.



- ❖ When entering data, remember to name and **SAVE** the document **OFTEN**.




- ❖ To make edits to the electronic form, you must **MODIFY YOUR TOOLBAR**. Follow these instructions to make this modification:




1. On the toolbar at the top of the page, click on **VIEW**.
2. Scroll down to **TOOLBARS**, and then scroll down and click on **FORMS**.

- ❖ To make edits to the electronic form, you must **MODIFY YOUR TOOLBAR**. Follow these instructions to make this modification: **(CONTINUED)**

3. This will enable you to view additional tools on your toolbar, such as the **padlock**  to lock and unlock your protected document.
























- ❖ To include data in the **HEADER** (starting on page 2 of the plans), please complete the following steps:

1. On the toolbar at the top of the page, click on the **PADLOCK** icon  to **unlock** the document.
2. On the toolbar, click on **VIEW**.
3. Scroll down and click on **HEADER/FOOTER**.


Header

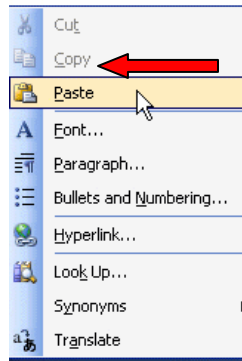
Name:	DOB:	Medicaid ID:	Record #:
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▼ Header and Footer

Insert AutoText ▼                       



- ❖ To **DUPLICATE (CUT & PASTE)** data and/or to add goals, please complete the following steps:

1. On the toolbar at the top of the page, click on the **PADLOCK** icon  to **unlock** the document.
2. **HIGHLIGHT** the data, table, etc. that you would like to duplicate.
3. **RIGHT** click your mouse key and click **COPY** of the pop-up toolbar.



4. **PLACE YOUR CURSOR** where you would like to enter the data, right click your mouse, and click **PASTE** on the pop-up toolbar.
  5. On the toolbar at the top of the page, click on the **PADLOCK** icon  to **re-lock** the document.
- ❖ The Word document was created and is **protected in electronic format** in order for you to enter text in the highlighted boxes. Many of the “text fields”/highlighted boxes have limited space to enter data, such that the form will not be significantly compromised. However, some text boxes allow for unlimited data entry and may re-arrange parts of the document. To “**CLEAN UP**” the document upon completion, please follow the instructions found below.



1. On the toolbar at the top of the page, click on the **PADLOCK** icon  to **unlock** the document.
  2. Make the necessary changes/re-arrangements.
  3. On the toolbar at the top of the page, click on the **PADLOCK** icon  to **re-lock** the document.
- ❖ For all additional questions, please contact the following email address:  
**contactdmh@ncmail.net**